



**REQUEST FOR PROPOSAL PS- #1223
LOTUS NOTES TO OFFICE 365 MIGRATION**

QUESTIONS AND ANSWERS

July 18, 2013

Updated 7/25/13, 7/31/13 & 8/5/13

1. Is your definition of 'end user' training referring to line staff for all County departments (2600+ users), or just IT staff involved in the migration and support of the project?

ANSWER: 'End user' refers to any user of the County's future Office 365 tenant. These users could be line staff, technical staff, or any level of management including elected officials. All 2600+ users will need some amount of training on how to use Office 365 functionality, and the County is seeking proposals on how to accomplish this.

2. If this end user training is only for IT staff, will there be a separate RFP for the training of all department staff?

ANSWER: Per answer to question #1, end user training is NOT only for IT staff. This RFP is intended to cover "how to use Office 365" training for all departmental staff; therefore there are no plans for a separate RFP for such training at this time. Recognizing the different knowledge required to train on the "use of" vs. the "administration of" Office 365, the County will consider proposals for the entire project scope, end user training only, or the entire scope less end user training as noted on page 5 of this RFP.

3. Page 16, item 3.u and 3.aa: When referring to end users using web app clients for Exchange Online, and needing training on Exchange Online, are we really talking about Outlook Web App? Do you expect any staff to access email using the full Outlook client, and if so, what version(s)?

ANSWER: In the case of the web app client for Exchange Online we are talking about Outlook Web App (OWA). The County is not standardized on one version of Microsoft Office. Because versions range between 2003, 2007, 2010, and 2013 we have a goal of standardizing on OWA. However, we expect that certain users may require the full Outlook client for specific functionality such as calendar management delegation. Therefore, the version of Outlook for such users will vary, but will need to be a version supported by Microsoft for use with Office 365.

4. Page 18, item 4.d.i: This may relate to our first question regarding who the definition of 'end-user', but for the Exchange Online training needing to cover encryption, spam filtering, archiving, and e-discovery, is this for line departmental staff using Outlook Web App? If so, what expectations do you have for those Outlook Web App end users needing to configure encryption and e-discovery?

ANSWER: We have approximately 1,000 users of our IronPort encryption appliance today. If a different encryption solution is implemented for use with Office 365, such as Exchange Hosted Encryption, these users will require training on how to send encrypted email messages with the new solution with the client(s) which support the use of this solution.

The number of users assigned an e-discovery role is yet to be determined as this is new functionality for the County, but these users will require training on how to use e-discovery features in the client(s) which support these features.

Added 7/25/13

5. When we say Office 365, does that include SharePoint and Lync?

ANSWER: Yes.

6. Do we know what the total size of the mail databases and archive databases are?

ANSWER: Mail databases on the server: 2730 at around 300 GB total size. Archive databases on the server today: 1145 at around 1000 GB total size. There are some local archive databases which we will be working to move to the server prior to migration. This will likely increase the total number and size of archive databases on the server, but we do not yet know by how much.

7. Regarding the number and type of references requested in the proposal format – will the County consider proposals if the number and type of references provided are less than what was requested?

ANSWER: Yes, but our preference is to speak with references who migrated from Lotus Notes to Office 365 using the proposer's services.

8. Regarding the use of the Outlook Web App vs. the Outlook client. Can we forecast how many people will use the Outlook client rather than the Outlook Web App?

ANSWER: Our preference is for our staff to use the Outlook Web App if possible, but we recognize that some staff may require the Outlook client for certain functions such as managing a delegated calendar. We have about 600-700 people using the web client for Domino today (as an alternative to the standard Notes client). Our intent is to reduce workstation application management and increase standardization by moving as many people as possible to OWA.

9. What is our current technology for anti-virus and spam filtering?

ANSWER: Right now we have several layers of anti-virus and malware protection. We use Cisco IronPort and Barracuda spam appliances in the DMZ. Our mail servers are protected by Trend Micro. Our workstations are protected with McAfee.

Additional clarification: We are expecting the proposed solution to meet or exceed the protection currently provided by our anti-virus and malware protection. We will consider new solutions or keeping our current products, if necessary, to maintain service levels.

10. In regards to the Lync implementation, are we currently using Sametime or will this be a new implementation for the County?

ANSWER: We are not using Sametime. Lync represents a new implementation as we do not currently have an enterprise wide solution for instant messaging.

11. The RFP mentions 85 eforms. Is there going to be a total number of applications and databases and workflows, or is it just going to be referred to as 85 eforms?

ANSWER: Most of the forms are just information routing and very few have workflow behind them. There are about 10 which have applications behind them which need to be migrated. There is a table of the databases, the eforms, and other details about the complexity of each starting on page 48 of the RFP.

12. Have we determined to what extent we will be using Lync beyond presence and instant messaging? Specifically, will we be using video conferencing capability and to what extent?

ANSWER: Given that this is new functionality for the County it is difficult to predict what the demand will be for video conferencing. The project team believes video conferencing is out of scope for the migration project.

13. In talking about archiving and e-discovery, are we looking for suggestions from the proposers or are we looking to implement only Office 365 provided archiving and e-discovery solutions?

ANSWER: We are open to the proposers' recommendations regarding archiving and e-discovery.

14. Since there are no specific requirements for archiving and e-discovery provided in the RFP, should that be part of the proposers' requirements gathering or is there more information available about what we are looking for in terms of archiving and e-discovery?

ANSWER: We do not have an e-discovery for email solution in place today. If a proposer feels that requirements gathering is recommended, it should be included as part of the proposal.

15. Do we know the planned destination for the archives currently in Notes? Will they be going to personal archive mailboxes or to .PST files or to some other location?

ANSWER: We do not have a planned destination for the archive databases, and are seeking proposals on how to best handle the migration of these databases.

16. Does our Office 365 plan include personal archive mailboxes?

ANSWER: We are targeting G1 subscriptions plus the archiving add-on SKU for most users. Some users will have G3 plans.

17. In terms of the proposal process, is there definitely going to be an in-person proposal presentation required for the process?

ANSWER: At this time the answer is yes. All proposers should be prepared to present in person in case they are selected as a "short-list" finalist.

18. It sounds like a number of SharePoint sites will ultimately be developed as part of this transition. Will end-user training be required on how to create SharePoint sites, and go into further configuration including SharePoint Designer?

ANSWER: We tried to delineate training between end-user training and in this case, SharePoint developer training. Our expectation is that SharePoint content will initially be created by technical staff but that this could be expanded to non-technical users down the road following the migration project. However, we are open to proposer recommendations on how to best address the training needs associated with this migration based on their prior experience with these types of implementations and knowledge of the technology.

19. Are we looking for end user training since we are coming from Lotus Notes and going to Office 365? If so, are we looking for onsite, or webinar sessions?

ANSWER: Yes. We are looking for proposals on the most effective way to accomplish this training.

20. Will all 2600+ users have Lync and SharePoint as well?

ANSWER: Yes.

21. Is it safe to assume the County will keep its local Active Directory infrastructure in place long term, and if so, is there a plan in place to synchronize identities to the cloud at this time?

ANSWER: Yes, our local Active Directory will be in place long term. We are currently looking at using dirsnc. We have also looked at federating. We are interested in what each proposer suggests on this topic.

22. Do we have a single forest or multi forest, and do we have a single domain or multi domain in terms of Active Directory?

ANSWER: We currently have multiple forests and domains but the plan is to have a single forest with multiple child domains prior to the Lotus Notes to Office 365 migration.

23. Is it known yet whether we expect to bring all 2600+ users online at the same time, and as such, need to have the training completed prior to cut-over?

ANSWER: We are looking for recommendations for the best approach to migrating and training this number of users.

24. How many physical locations do we have?

ANSWER: Staff members are located in about 70 physical locations within the County of San Luis Obispo. About 30 of these locations are on wide area network circuits. The major campuses include the downtown government center complex, Health Agency, Department of Social Services, and Sheriff's Office.

25. Do we have Notes applications which need to be migrated to the cloud as well?

ANSWER: In terms of applications which need to be migrated, it would be the list of eforms beginning on page 48 of the RFP.

26. We are asking for a time and materials bid with a not to exceed amount. Can we clarify what that means, and if this makes it a fixed bid where proposers are only paid time and materials, how do proposers protect themselves from scope change or unknowns when it is time and materials but not to exceed – how would that be handled?

ANSWER: The proposals should have enough granularity so we will be able to make a full scope assessment and jointly agree on what will be included in the implementation. Your proposal should explain in detail what it will take to migrate Notes, its ancillary applications, implement Lync, and deliver training. Proposals should include recommendations for additional tasks that we may consider as a follow up to the initial implementation. Such granularity will allow us to determine what is in scope for the implementation and the need, or not, to have additional change orders. A change order process would be used to manage any changes to scope once the contract has been awarded and implementation begins. We have a specific budget for the project and typically the County negotiates deliverable-based fixed price contracts where there are payments associated with specific deliverables.

27. Will we be using SkyDrive? Does the County have a policy about documents which can be stored on an individual's SkyDrive versus file servers?

ANSWER: We don't know. We believe SkyDrive is included with the Office 365 subscription, but we don't know what options there are, if any, for controlling its use. The County does

have an information security policy set which describes requirements for protected information. We would expect that data which is sensitive should not be stored in SkyDrive, but we have not done a complete analysis yet. The use of SkyDrive is not specifically within the scope of this project.

28. Do we have any inactive mailboxes, and if so, do these need to be migrated?

ANSWER: We hope to weed out any inactive mailboxes so they are not migrated.

29. Do we require 13 hard copies of the proposal to be submitted or is it acceptable to only submit the proposal electronically?

ANSWER: Thirteen (13) hard copies of the proposal are required in addition to one (1) electronic copy of the proposal on CD as stated on the cover sheet of the RFP.

Added 7/31/13

30. What type of identity management directory or directories do you have?

ANSWER: There are two identity management directories for the enterprise. Microsoft Active Directory and IBM Domino Directory.

a. How many Active Directory forests do you have?

ANSWER: Currently we have two, but we plan to have only one by the beginning of this project.

b. How many Active Directory domains do you have?

ANSWER: When the project starts, our forest will have four domains.

31. Are all users represented in a single directory (Active Directory or Domino Directory)?

ANSWER: No, some users currently exist in either or both of the directories. We plan to have all Domino users in Active Directory by the beginning of this project.

32. It was stated that the County phone directory is being published using Domino. After migration this can be accomplished by populating phone numbers on corresponding user accounts and making them visible in the Global Address List on the Office 365 side. Is this the expectation? Please elaborate if possible.

ANSWER: The County is seeking proposals on how best to replace this functionality. This is currently provided by a Domino application that the County developed. The phone directory application includes four views in the Notes client: employees by department, employees by last name, department phones and addresses, and department fax numbers. This information is maintained for the County by telephone staff in the GSA-IT department using the Notes client. The "employees by last name" view can be searched using a web browser on the County's intranet site.

33. Per RFP: *'Security settings (access control lists) will be migrated.'*

Could you please elaborate if this is in regards to NTFS security on documents or mailbox permissions?

ANSWER: Access control lists (ACLs) control which tasks a user can perform in any particular Domino database. ACLs are enhanced by access level privileges defined in the Domino server document and roles defined in the template used by the database. NTFS security is not used to secure Domino data.

34. Per RFP: *'Unless all users are migrated simultaneously, rich co-existence will be maintained for the period of time during which some County groupware users are on Office 365 and the remainder is on Lotus Notes.'*

What is the County's preference?

- To have coexistence and be able to pilot the platform (introduces some challenges and is more labor intensive process)?

OR

- Not have coexistence and switch everybody over to the new platform at the same time?

ANSWER: The County is seeking proposals for the best approach based on your prior migration experience with organizations of similar size to the County.

35. Are file and print services the only resources located in Active Directory?

ANSWER: No, we take full advantage of the resources available in Active Directory today. Examples include users, groups, policies, service accounts, etc.

36. Is decommissioning of legacy platform to be taken by the implementation partner or by the County?

ANSWER: County staff will decommission the Domino environment.

37. Is Cisco IronPort to be kept for any of the following functionalities?

- Encryption
- Large file attachment handling
- Security management appliance

ANSWER: Possibly for encryption, if we do not use Exchange Hosted Encryption.

38. What is the total number of existing group objects, user objects and contact objects in the E-Directory that will be synchronized (e-mail enabled only)?

ANSWER: There is no relationship/integration/synchronization between Active Directory and Domino today; they are two distinct directories. The County understands that Active Directory will become integral to the operation of Office 365 in the future. Furthermore, there are no Novell products (i.e. eDirectory or Groupwise) in the County's environment. The numbers provided below pertain to the Domino environment as these are the objects which will need to be created in Active Directory if they do not already exist and then synchronized for use with Office 365.

Object Class	Number of Objects
Total number of User objects in the AD forest?	ANSWER: ~2600 person documents in Domino Directory
Total number of Group objects in the AD forest?	ANSWER: 2350 group documents in Domino Directory
Total number of Contact objects in the AD forest?	<p>ANSWER: There are some external contact entries in the Domino Directory (AKA County Address Book). The following shared address books require migration as well:</p> <ul style="list-style-type: none"> • AS_marine_aircraft_address.nsf, with 24 contacts and 1 group • OES_contacts.nsf, with 531 contacts and 19 groups • PH_Alerting.nsf with 1778 contacts and 265 groups • SH_detect_names.nsf with 1678 contacts and 5 groups • SH_records_names.nsf with 207 contacts and 2 groups <p>Access control lists restrict access to the appropriate users of each shared address book.</p>

39. What are the SMTP domains that need to be supported in the Microsoft Online Services environment?

ANSWER: See table below.

List all SMTP Domains	Number of mailboxes per domain	Internet MX record present?
co.slo.ca.us	~2800	yes

40. Does the County own each primary SMTP domain that needs to be supported in the MS Online environment, and have immediate access to make changes to Internet DNS records for those domains?

ANSWER: Yes.

41. Any other messaging systems currently in use for mailboxes that will be migrated?

ANSWER: No. See table below.

System Platform	Number to Migrate	Locations/Identifiers
Exchange 2000	0	
Exchange 2003	0	
Exchange 2007	0	
Exchange 2010	0	
IBM Lotus Domino	~2800	San Luis Obispo, CA
GroupWise	0	
Other: _____	0	

42. How many mailboxes require data migration?

ANSWER: All active mailboxes (including mailin databases) and archives for active users. See table below and page 46 of the RFP.

Region	Standard (256 MB - 25 GB)	Kiosk Licenses(1000 MB)
North/South America	<ul style="list-style-type: none">• ~2800 mailboxes at around 300 GB total size.• 1145 archive databases on the server today at around 1000 GB total size.	The County does not plan to purchase any Kiosk licenses
Europe, Middle East, Africa	0	
Asia, Australia, Pacific	0	

43. It was stated that Shared Mailboxes will need to be migrated. Do you require migrating data for Shared Mailboxes as well, or would you like to provide new shared mailboxes in Office 365; this implies service accounts as well.

ANSWER: Yes, we have a requirement to move all data associated with shared mailboxes.

44. If pilot is required, how many users will be in pilot group?

ANSWER: Possibly around 50.

45. To confirm, is approximate average mailbox size 200MB with some exceptions as stated per RFP? What is the approximate total/average mailbox size of mailboxes to be migrated?

ANSWER: All active users have a 200 MB quota in place, except for four (4) users who have 400 MB quotas and ten (10) users with 600 MB quotas. As noted above, there are ~2800 mailboxes at around 300 GB total size. Additionally, as noted above, we have 1145 archive databases on the server today with a total size around 1000 GB.

46. Please complete the following table to note your specific requirements.

ANSWER: See table below.

Exchange Functionality	Yes / No	Comments
Folder Retention	Yes	Existing mail file folder structure must be migrated.
ActiveSync Policy	N/A	We are not using Traveller in Domino today.
BES Policy	No	Retiring BES
Journaling	No	
FOPE Admin Center Access	Yes	
Message Size Limits (non-standard)	N/A	Limits are set by Office 365 service description
SMTP Relay	No	This will be done without an Exchange server
POP/IMAP4	Yes	
Attachments over 25MB	N/A	Limits are set by Office 365 service description
Support for Outlook 2003	No	Any customers with Office 2003 will use Outlook Web App
External Mail Forwarding	Yes	Assuming this means external addresses in the GAL

Other? Please list:

47. Does the County have external mail routing / relay requirements?

ANSWER: The County has no external mail routing requirements. The County does have internal relay requirements for applications that do not support authenticated users over TLS.

48. Please identify any firewall/GPO/web traffic control blocks being applied to workstations. Please identify any organization-wide policies that may be blocking internet access.

ANSWER: These are applied at a department level. We know of a few examples where GPOs are used to block Internet access. We recognize that Internet access is required to access Office 365.

49. Any software deployment and patch management solution?

ANSWER: No.

50. Please describe e-mail archiving, retention and legal hold requirements in Office 365?

ANSWER: This is unknown – to be determined in project.

51. Please describe any e-mail archiving ***solution currently implemented*** in the environment and if Historical Data Load (HDL) is required.

ANSWER: End users have the ability to create their own archive files if needed in the current Domino environment and may choose to either store that archive on the Domino server or locally. We would move all server-based archive data into Office 365.

52. Is Outlook client implemented at all? What version?

ANSWER: While various versions of Outlook may be installed on some number of workstations in the County's environment, the Outlook client is not currently used to access County email. See table below.

Client	Number of machines
Outlook 2003	0
Outlook 2007	0
Outlook 2010	0
Outlook 2011 for Mac	0
Pre-Outlook 2003	0
GroupWise	0
Lotus Notes client	~2300
Other: _____	0

53. Have you deployed or do you expect to deploy any custom mail client add-ons? Any custom add-ons used with GroupWise client need to be specified to check the compatibility with Outlook client.

ANSWER: A small number of Lotus Notes users have client add-ons today and the County will address these add-ons as needed. This is not part of the scope of work for proposers.

54. Is software deployed from a central location to end-users (SCCM, Altiris, GPO, etc.)?

ANSWER: No.

55. Please identify any email messaging/voice mail functionality currently implemented in your environment. Please provide as much detail as possible.

ANSWER: The existing voicemail system is a stand-alone system and depends on SMTP for voicemail message notification and delivery.

56. Please list any specific requirements not already covered in RFP or this questionnaire that may impact delivery of non-standard services.

ANSWER: None that we are aware of.

57. Will the end users mainly access Office 365 on their standard desktop/workstations or will the end users only access Office 365 remotely via the Internet?

ANSWER: End users will mainly access Office 365 from their standard desktop/workstations.

Added 8/5/13

58. How many Domino Domains and if more than one, please list them?

ANSWER: One.

59. Which version of Windows Server is Notes Domino running on?

ANSWER: Virtual (VMware) Windows Server 2003 and 2008, plus two physical AIX (6.1.6.11) servers that run the production mail cluster.

60. Where are the PABs (Personal Address Books) currently located, locally or centrally and if so, where are they located?

ANSWER: All PABs are local, usually in c:\lotus\notes\data.

61. Are the PABs being synched to the users mail files?

ANSWER: Some Web based users and Good Mobile Messaging users have that feature enabled.

62. End-users Archive their Notes mailboxes. Can we rely on the fact that they are all being stored on the Archive Domino Server?

ANSWER: Some are done locally but we will only migrate those that are on our archiving server. We will be working to move any needed local archives to the archiving server prior to the start of this migration. The County welcomes any recommendations on alternate approaches in the RFP responses.

63. Or will some users have local archives?

ANSWER: Yes but those will not be migrated. We will be working to move any needed local archives to the archiving server prior to the start of this migration. The County welcomes any recommendations on alternate approaches in the RFP responses.

64. End-users use Journals and if so, do you plan to have them migrated?

ANSWER: Very few users make use of Journals. We do not have a plan to migrate them and would look to the solution provider for assistance.

65. Are Journals located locally or centrally and if so, where are they located?

ANSWER: Journals are stored locally.

66. How extensive is encrypted mail?

ANSWER: End users are able to send Notes mail internally using the "Encrypt" option; however, we have not trained them to do so. We do not have an estimate on how many of them regularly use it. The County's preferred method of mail encryption applies to sending mail outside our domain using the IronPort appliances. We have several departments (about 1000 people) using IronPort email encryption today.

67. How many Notes Groups have SMTP addresses assigned?

ANSWER: 271 groups have SMTP addresses.

68. Do the AD user objects have email addresses associated with them?

ANSWER: Most objects have an SMTP address but we plan to programmatically add any that are missing.

69. Is the primary SMTP Address staying the same?

ANSWER: Yes.

70. What is the current mail flow to the external users? Is it staying the same?

ANSWER: The mail flow will change as we transition to the cloud and possibly utilize Exchange Hosted Encryption (EHE). If we continue to use IronPort email encryption we would maintain an on-premise external SMTP presence. If we move to Office 365 and EHE we would no longer have any on premise external SMTP services.

71. Is there a Smart Host involved that can do LDAP look-ups?

ANSWER: We do not use the Smart Host feature of Lotus Domino Notes but LDAP services are available from the Domino system for look-ups.